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PRACTICE 360°
SMART TOOLS FOR CARE

Practice 360: Diabetes Toolset – Preparing Your EMR

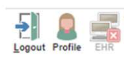
- Hello and welcome to the learning series for eDOCSNL Practice 360: Diabetes Smart Tools for Care.
- Practice 360 is an ongoing eDOCSNL initiative designed to increase clinical value and practice efficiencies in the Med Access EMR for users in Newfoundland and Labrador..
- eDOCSNL has partnered with Diabetes Canada and provincial advisory groups on the development that aligns to the National Diabetes Clinical Practice Guidelines. This is a first of its kind initiative that Newfoundland and Labrador and our care providers are leading
- In this video we will detail how to prepare your EMR to enable you to use the diabetes toolset. There are a number of settings that may have to be changed, templates favorited and other preparatory steps before you may even see the content, depending on how you currently use your EMR.
- Some of these changes will need to be made by an admin user in your EMR instance. Please identify the user and have them review the documentation that will be provided on edocsnl.ca as well as watching this video.
- This video covers a lot of ground and we don't expect you to take all of this in at once. The video and accompanying documentation will be posted to edocsnl.ca under the Practice 360 tab.

- Please keep in mind that all screenshots seen in this video are taken from a test system, so the content may not exactly reflect what you see in your own EMR but be assured the final product will be supported with all the necessary information to ensure you have absolute clarity and knowledge on how to use the toolset effectively in your practice.

Template Access

Must be set up first: Go to the Profile icon in the upper left hand corner of the main EMR screen and select the "User List" when the window opens up. Select the desired user from the list.

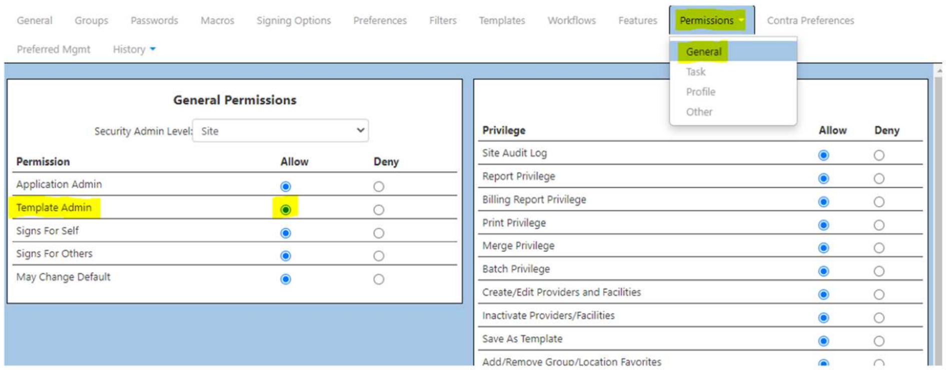
1



2

Template Admin Permission

Navigate to the permissions tab in the user profile, select “General” and ensure that “Template Admin” is activated for the user.



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In order to be able to access the template library, you may need to have “Template Admin” activated under your profile.

It is possible that you already have access to this feature and don’t need to do anything to proceed. If this is the case, you will already see the “Templates” icon on your dashboard as described previously.

In some cases, an admin user in your EMR instances may be needed to enable this for you if you are unable to access these settings in your profile.

To enable this feature, simply navigate to the “Permissions” tab under the user profile in question, select “General” and click the button to “Allow” the Template Admin functionality.

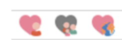
You should now see the Templates icon on your dashboard.

Practice 360 Content Information

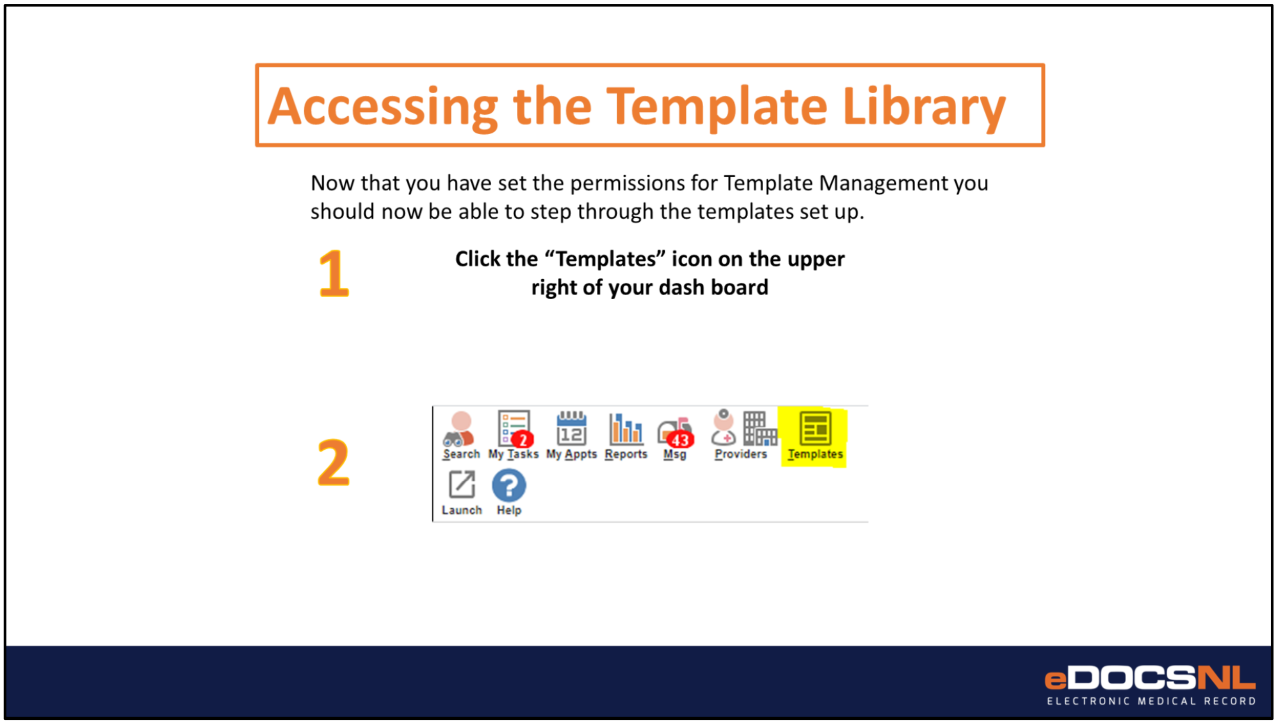
Use of the Diabetes Toolset requires various task templates to be favorited for use.

This means that you will be selecting the user or clinic favorite depending on whether practice 360 is being set up for a user or for the clinic.

Left heart – user favorite
Right heart- clinic favorite



Each of the task templates is prefixed with ***edocsnl**



Throughout this video you will see and hear references to the template library.
To access the template library, simply click the “templates” icon in the upper right corner in your normal dashboard view.
Note that you cannot see this icon while in a patient chart.
If you do not see the icon, it means you do not have the template library made viewable in your profile permissions.
In this case, you may have to get an admin user to turn on the permission for you in order to complete some of the next steps.

How to Favorite the Visit Template

1 With in Template Management window click the "Visits" Tab on the horizontal list of template tabs

2 In Template Name field Search for *eDOCSNL

3 Click the heart icon to the right to favorite a template (*eDOCSNL Diabetes Visit). The left heart favorites it for the user, the right heart favorites the template for your clinic use.

Determine if you are setting up for the user or for the clinic

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Favoriting templates is not difficult but does require knowing how to navigate the template library.
To favorite task templates, enter the task library as described previously and select the "task" tab from the tabs in the horizontal line towards the top of the page.
In the "Template Name" field, type "diabetes".
The templates you need to favorite are listed on the following slide. To favorite a template for use for yourself, click the leftmost heart which you will find to the right of the template you have selected. If you want to favorite the template so that everyone in your clinic can use it, you will click the rightmost heart.
When the color changes from grey to pink, you have successfully favorited the template.

Practice 360 Content Information

We have referrals for Diabetes programs that may not be in your region. As you set up the content, you need to decide whether you would favorite for example: a WH Diabetes Program referral when you are in Eastern Health. Favorite only the content that would be used.

Searching for Task Templates- use your CATEGORY filter to search for the different Task Templates

In the template library select the task tab

Task Templates to Favorite

eDOCSNL Diabetes Visit (you should have already favorited this slide-6)
eDOCSNL Eastern Health Diabetes Program Referral – Category=Consult (Used to contact EH Diabetes Program)
eDOCSNL Western Health Diabetes Program Referral – Category=Consult (Used to contact WH Diabetes Program)
eDOCSNL Central Health Diabetes Program Referral – Category=Consult (Used to contact CH Diabetes Program)
eDOCSNL Labrador-Grenfell Health Diabetes Program Referral – Category=Consult (Used to contact LG Diabetes Program)
eDOCSNL Diabetic Foot Exam/Foot Care- Category=Attachment (as per the below)

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Here is a list of the templates that we would suggest favoriting.
The only absolutely necessary template to favorite is the "eDOCSNL Diabetes Visit" template, the rest are optional.
However, if you do not favorite them, the only place you will be easily able to access them is from the eDOCSNL Diabetes Care plan.
Favoriting them will allow you to use them from other areas of the patient's chart.

Task Templates to Favorite

eDOCSNL Medication Therapy Services Referral- Category = Consult
eDOCSNL q3 Monthly HbA1c- Category = Lab
eDOCSNL Diabetic Annual Labs- Category = Lab
eDOCSNL Annual Screening Bloodwork for NAFLD – Category = Lab

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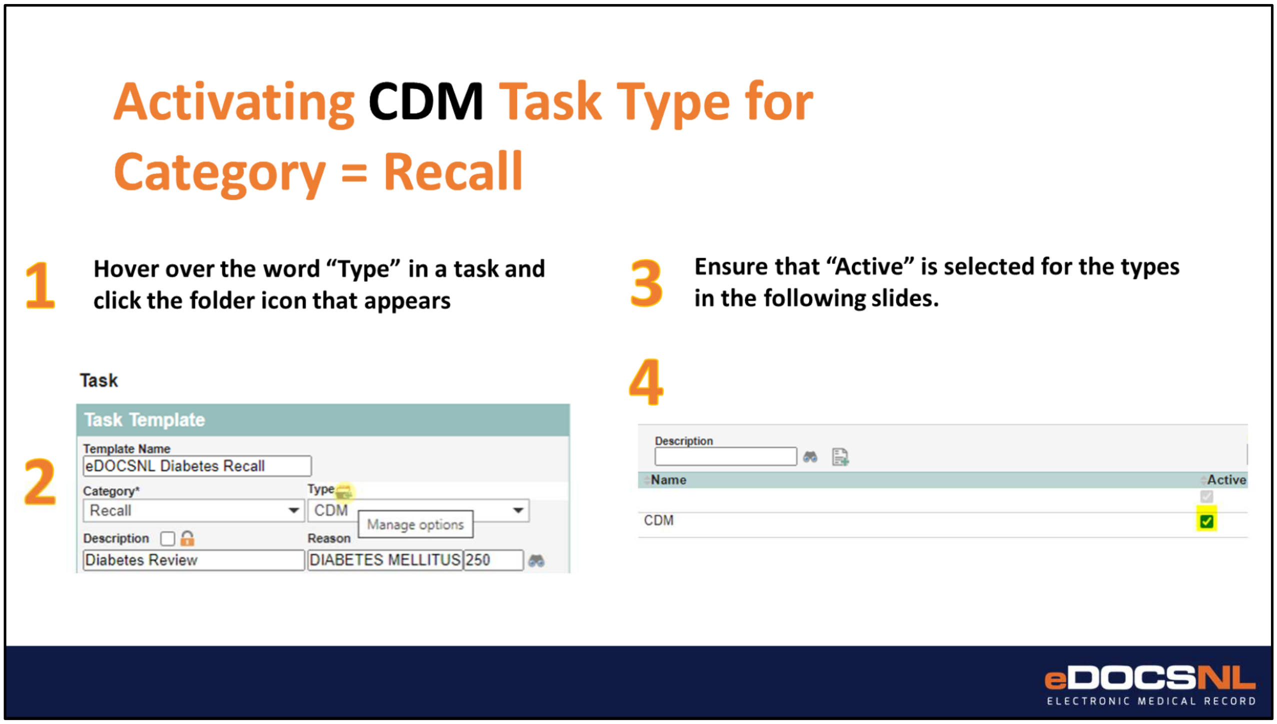
Task Template Types

In order to use the task templates, the types need to be set to active.



The eDOCSNL tools and custom templates come with some custom task types for standardization and to ensure the goals, reports, triggers and dashboard function properly.

In order to specify a "type" in a task, which is useful for filing the task and finding it later, you will need to activate the types for each task.

To do this you will need to click on the name of the tasks in the previous slides one by one and activate the types as seen in the next few slides.

"types" are activated by clicking on managed list

Activating Task Type **Diabetic Foot Exam** for Category = Attachment

1 **Locate the "eDOCSNL Diabetic Foot Exam/Foot Care" Template and open it (Hover over the word "Type" in the task and click the folder icon that appears) and activate the following type below:**

Diabetic Foot Exam ☑

Attachment Types Management

Table: Attachment Types | Description | Use Privilege: Public | Edit Privilege: Public

Name	Active	Sort
Clinical Note	☐	0
Consent for Immunization	☐	0
COPD Action Plan	☐	0
Diabetic Foot Exam	☑	0
Framingham Risk Score	☐	0

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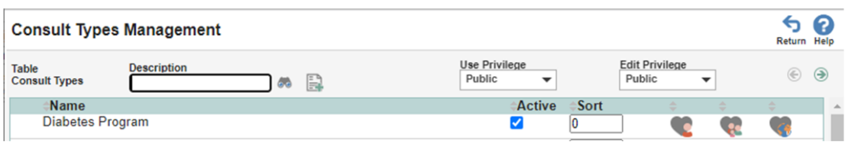
Activating Task Type Diabetes Program Category = Consult

Find any of the Diabetes Program referrals and open the task then, hover over the word "Type" in the task and click the folder icon that appears. Activate the following type below:

Diabetes Program



As well as: "Smokers' Helpline", "Pharmacist" and "Ophthalmologist"

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Activating Profile Types

Template management: Select Profile Tab

1 Select NEW (far right) then choose category of ‘Lifestyle’. Hover over the word “Type” on task and click the folder icon that appears

2 Search for either of these types below and make ACTIVE

Name	Active
Ex-Smoker <= 5 years	☑
Ex-smoker > 5 years	☑
Exercise	☑
Marijuana	☑
No Smoking, No Alcohol	☑
Non-smoker	☑
Pollution	☑
Smoker	☑
Transgender	☑
Vaping with Nicotine	☑
Vaping without nicotine	☑
Alcohol	☑
Smoking	☑
Drug Use	☑
Eating	☑

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Activating Task Types for Lab Requisitions

Go to either of the following templates:

Lab, Diabetes Labs 3 Months, q3 Monthly HbA1c, eDOCSNL q3 Monthly HbA1c	3 months
Lab, Diabetes Lab Annual, Annual Diabetic Labs, eDOCSNL Diabetic Annual Labs	1 year

Favorite the following types:

Diabetes Lab 3 Months	☑
Diabetes Lab Annual	☑

As well as "NAFLD Screening (ALT)"

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Activating Task Types for Immunization

Go to either of the following templates:

- Immunization, Pneumococcal Conjugate, Diabetic Pneumococcal Vaccine
- Immunization, Pneumococcal Polysaccharide, Diabetic Pneumococcal Vaccine

Favorite the following types:

- [x] Influenza Vaccine
- [x] Pneumococcal Conjugate
- [x] Pneumococcal Polysaccharide

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Activating Task Types for other categories

Additional types to be activated:

- Navigate to the Attachment task for the Framingham CV Risk tool and activate: “PHQ-9” and “GAD-7”, ensure the “Framingham” type is active
- Bring up a blank task, change the category to “Meds” and activate the type “Authorization”

Check that the above are active: Open up the particular Category type task and then look at the list of types in the drop down. If the particular type is not there as above, you will need to open up the type management as shown in slide 12 and activate the types for the particular above category.

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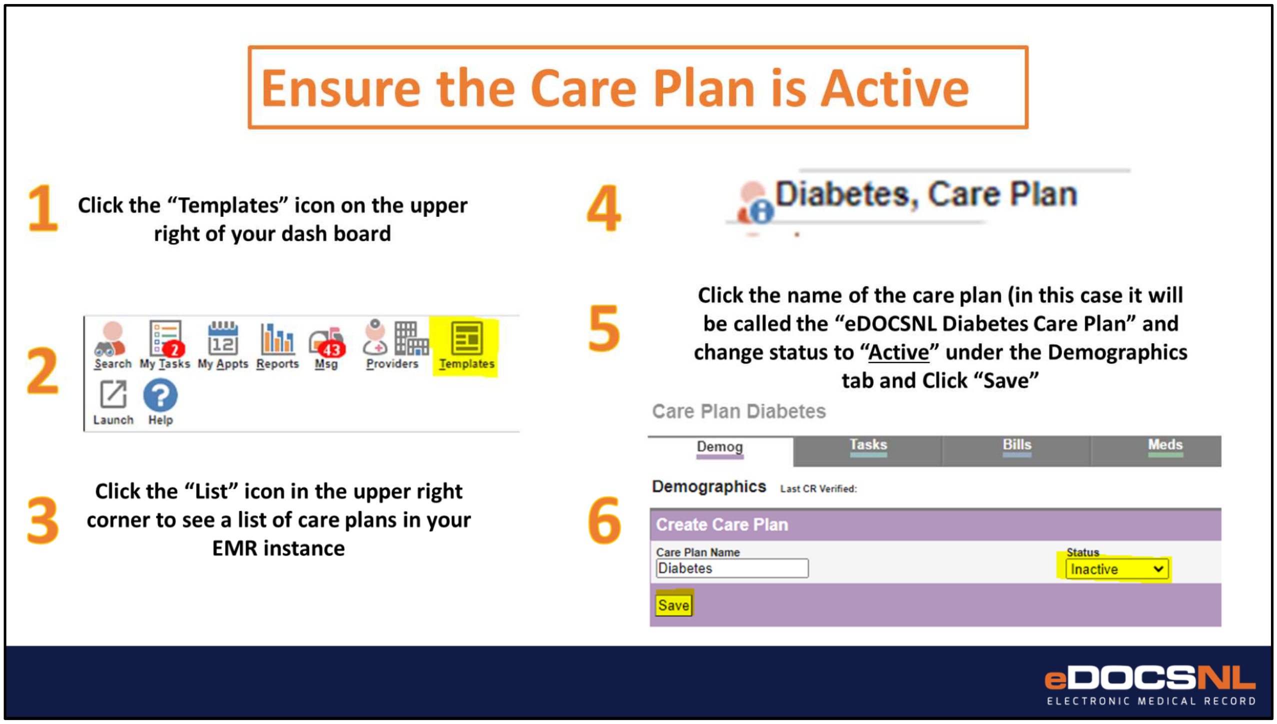
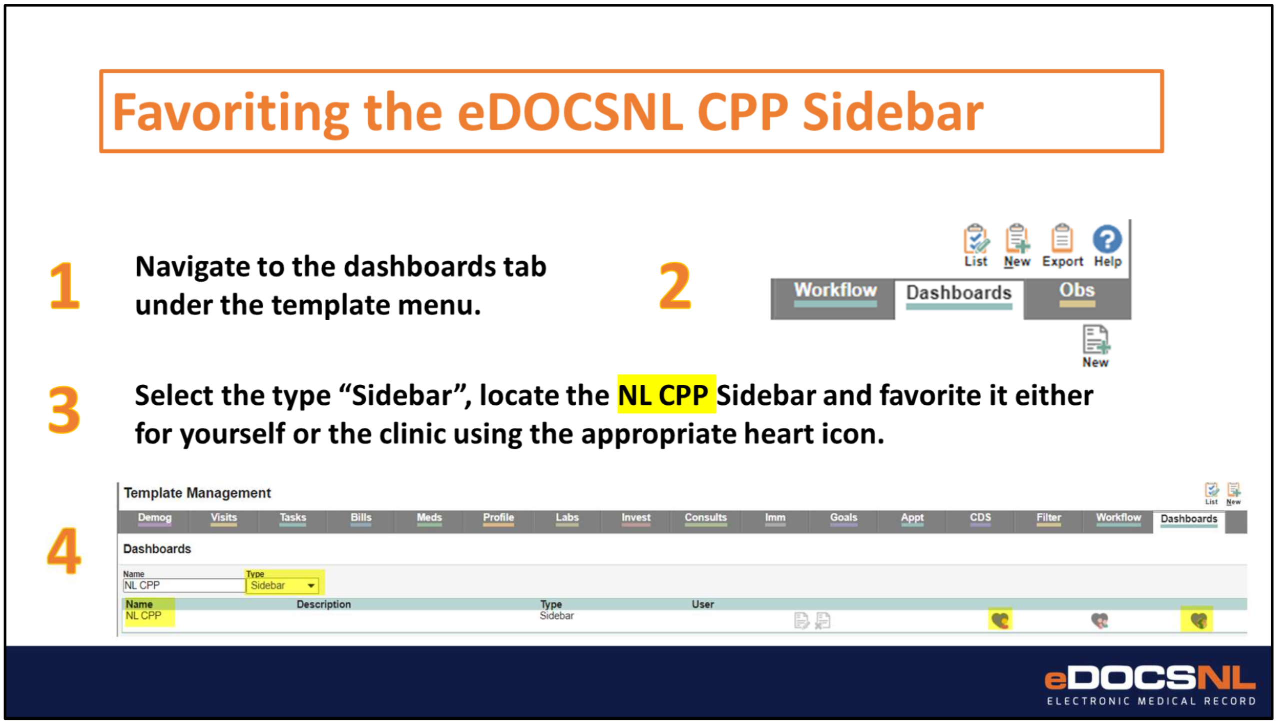
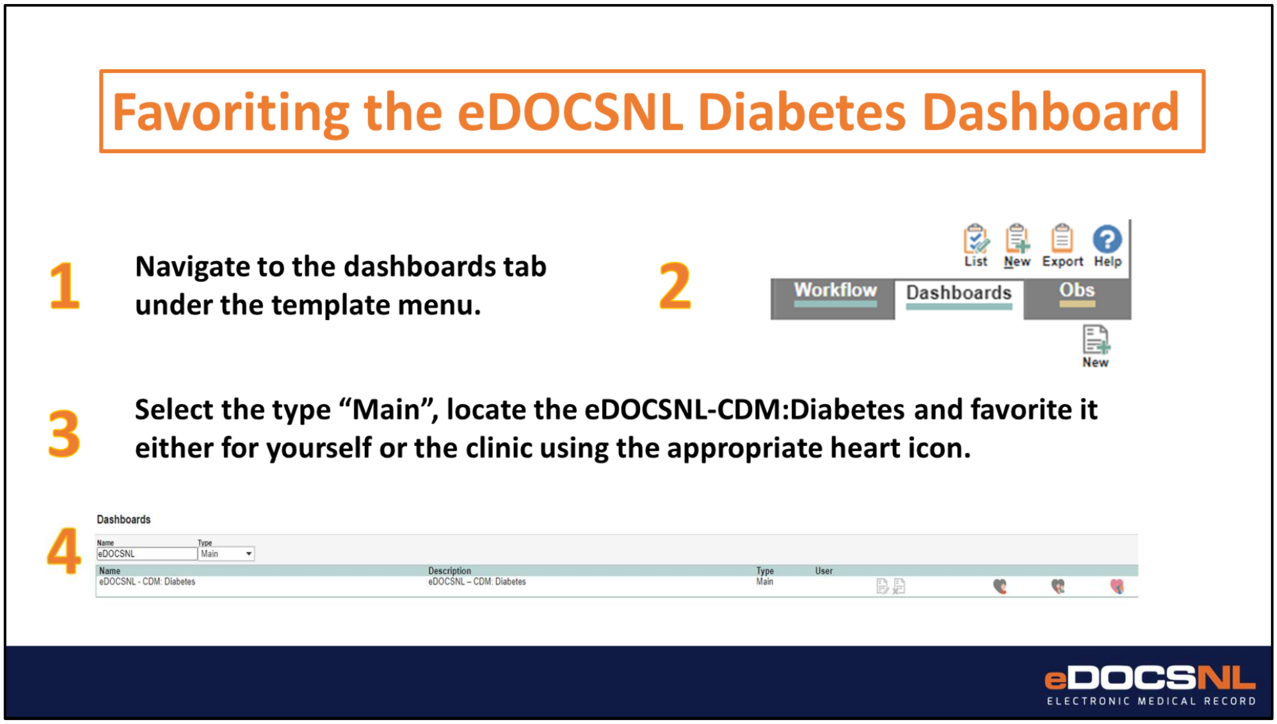


The diabetes care plan should be active on import. However, each EMR instance is different and you may discover that the care plan comes into your instance as inactive.
If this is the case you will not be able to see the eDOCSNL Diabetes Care Plan in your dropdown list of careplans which are found by hovering over the "Careplan" icon in a visit.
If this is the case, navigate to the Template library as described previously, click the "List" icon in the very upper right corner of your screen, locate the eDOCSNL Siabetes Care Plan and click it.
When you have accessed the care plan, click the "Demographics" tab in the plan and changes the status from "Inactive" to "active".
You will now be able to use the eDOCSNL Diabetes Care plan as you would any other.



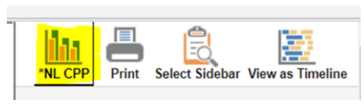
The default sidebar, that you see to the far right on every patient chart, may not have a visible section for goals.
eDOCSNL has built a sidebar which has this feature and more that you may need to use to view the goals from a patient chart view.
To be able to access this sidebar, you will need to favorite it.
Go to the template library and select the "dashboards" tab, find the eDOCSNL NL CPP sidebar and favorite it.



The default sidebar, that you see to the far right on every patient chart, may not have a visible section for goals.
eDOCSNL has built a sidebar which has this feature and more that you may need to use to view the goals from a patient chart view.
To be able to access this sidebar, you will need to favorite it.
Go to the template library and select the “dashboards” tab, find the eDOCSNL NL CPP sidebar and favorite it.

Accessing the sidebar from patients chart

Once favorited, the sidebar will appear as selectable on the top of your existing sidebar, simply click it to make it appear.



If you wish this sidebar to be your personal preference, go to your profile, and go to preferences tab and select this sidebar from the sidebar drop down.

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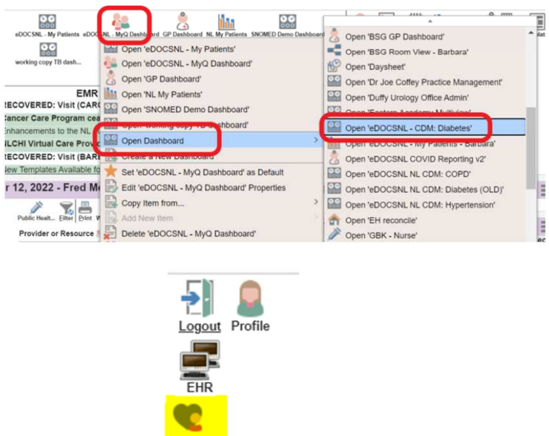
Now, when you are in a patient's chart, you will see the eDOCSNL NL CPP Sidebar icon on top of your existing sidebar.
Click the icon to open the sidebar, which will have the goals functionality enabled.

Accessing the Dashboard from main EMR screen



1 **Right click on any dashboard icon on your default dashboard**

2 **Hover over "Open Dashboard"**

3 **Select the "eDOCSNL – CDM: Diabetes" dashboard**

4 **Favorite the dashboard by clicking the heart icon in the upper left corner of your dashboard**

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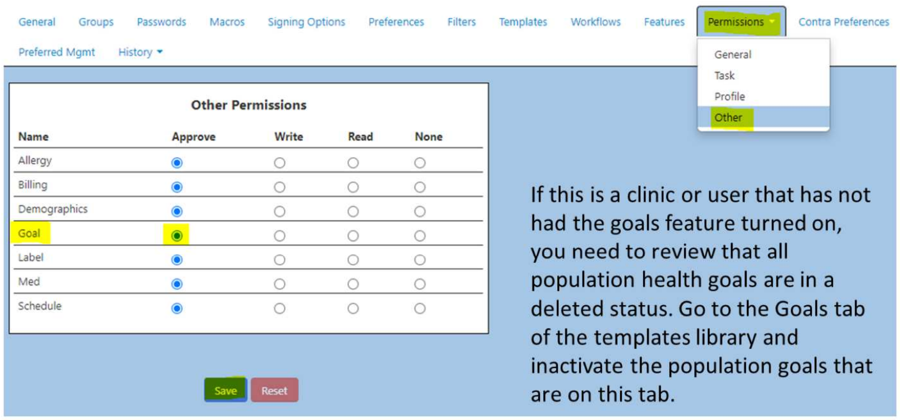
Name the template. We would suggest the title you see here as it will be consistent with future content from the initiative and is a meaningful and recognizable title.
Specify a duration for the appointment. Your approach to this will depend on your intent. If you would like to complete the visit template in one visit, make sure you specify a realistic time frame for doing this.
Make sure the appointment type is active or you won't be able to use it.
The "edit privilege" dictates who can change this appointment type and its characteristics, while the "use privilege" can restrict who can use this appointment type.
Make sure you attach the visit template that was outlined in the preceding slides, this would be "eDOCSNL Diabetes Visit". If this step is not performed correctly then the template will not launch automatically when the visit is started.

Configuring user profiles for Goals

Navigate to user profile then permissions tab, select "other" and ensure that Goals are set to 'Approve' for the user.



If this is a clinic or user that has not had the goals feature turned on, you need to review that all population health goals are in a deleted status. Go to the Goals tab of the templates library and inactivate the population goals that are on this tab.

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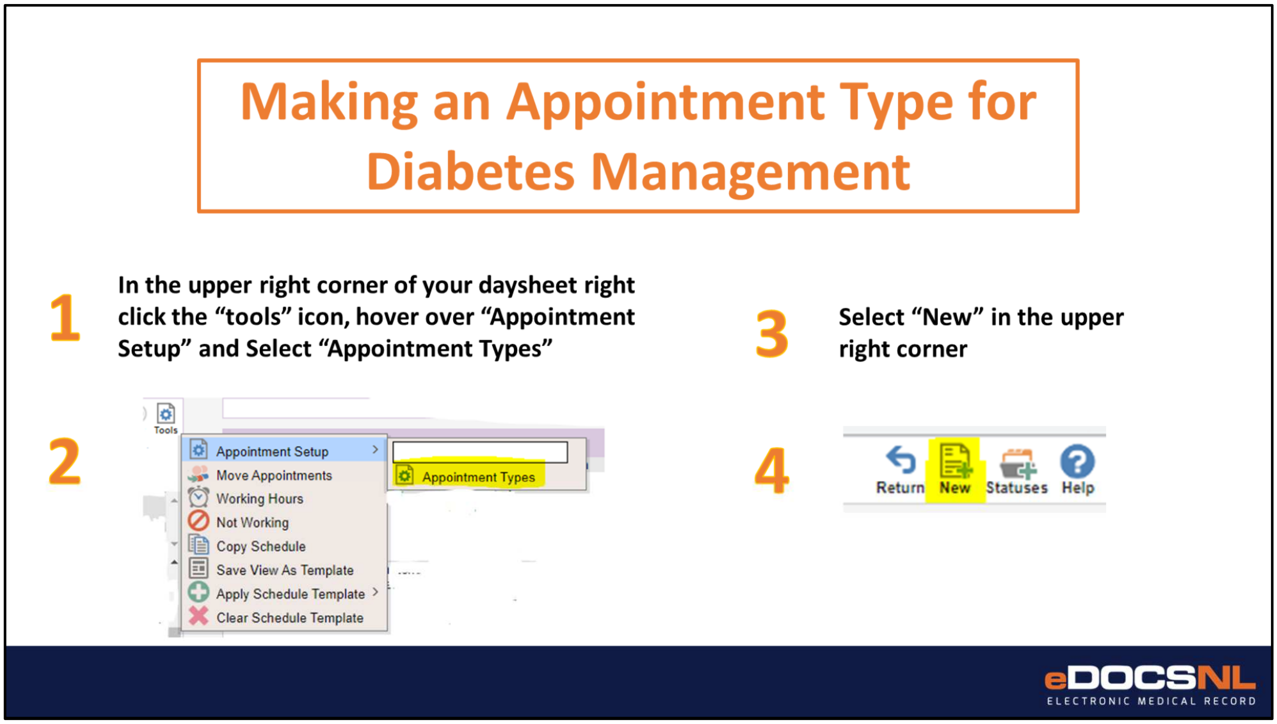
In order to take advantage of the goals feature in the Diabetes Care Plan, user accounts will need to be configured to enable access to the feature.
It is possible that you already have access to this feature and don't need to do anything to proceed.
You can verify this by checking your user account profile or activate this permission if it is not already enabled for you.
In some cases, an admin user in your EMR instances may be needed to enable this for you.
To enable this feature, simply navigate to the "Permissions" tab under the user profile in question, select "Other" and click the button to "Approve" the goals feature.

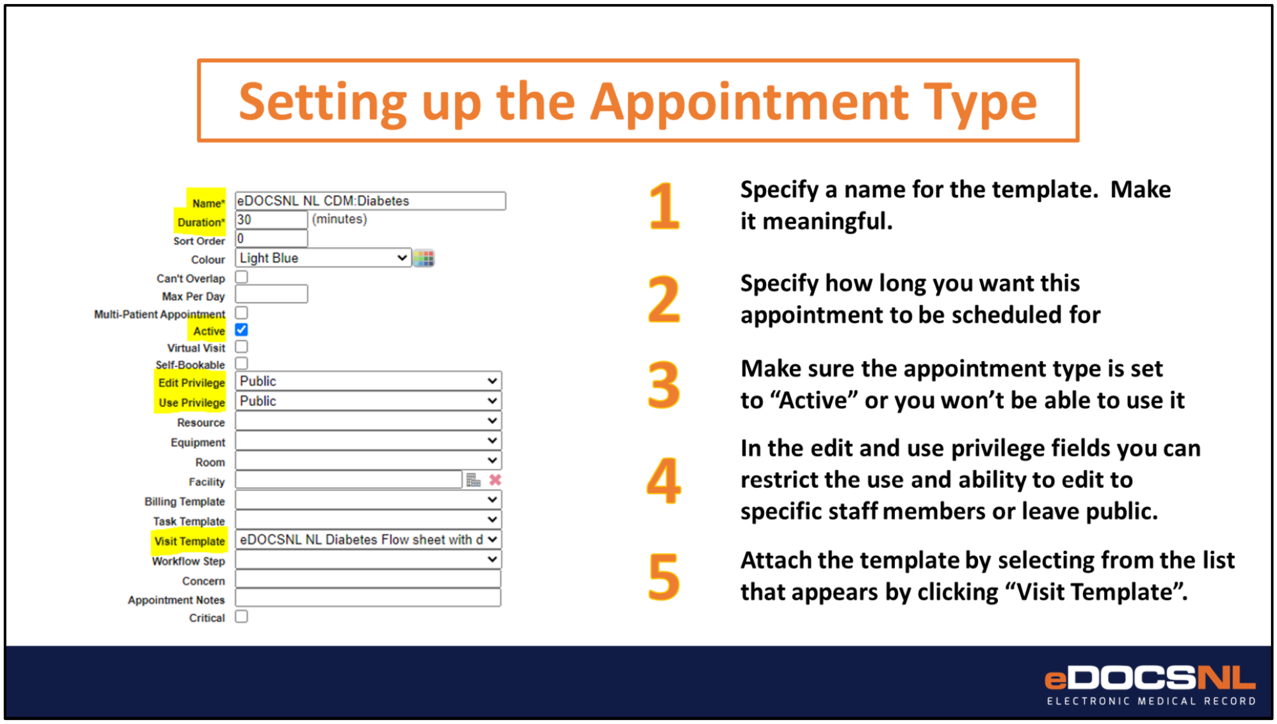


This next piece is optional and is the final configuration step to prepare your EMR for using the Practice 360 Diabetes Tools.

If you would like to launch the diabetes visit template directly from your daysheet, you can attach the visit template to an appointment type and then it will launch automatically when you start the visit.

Right click the “tools” icon in the corner of your schedule, hover over “appointment Setup” and select “appointment Types”.

Select “new” in the upper right corner of the list of appointment types.



Name the template. We would suggest the title you see here as it will be consistent with future content from the initiative and is a meaningful and recognizable title.
Specify a duration for the appointment. Your approach to this will depend on your intent. If you would like to complete the visit template in one visit, make sure you specify a realistic time frame for doing this.
Make sure the appointment type is active or you won't be able to use it.
The "edit privilege" dictates who can change this appointment type and its characteristics, while the "use privilege" can restrict who can use this appointment type.
Make sure you attach the visit template that was outlined in the preceding slides, this would be "eDOCSNL Diabetes Visit". If this step is not performed correctly then the template will not launch automatically when the visit is started.

- This concludes the EMR setup to enable use of the Diabetes Tools. If you have any trouble following these steps, please reach out to info@edocsnl.ca.
- Thank you for watching this Practice 360: Diabetes Toolset video. This toolset is a collaborative initiative of eDOCSNL and Diabetes Canada
- For more detail on each component of the toolset please continue watching the remainder of the video series which can be found on the eDOCSNL website at eDOCSNL.ca under the Practice 360 tab.